

**REAL ESTATE APPRAISERS APPLICATION ADVISORY COMMITTEE  
MINUTES  
November 17, 2004**

**PRESENT:** Marla Britton, James Coutts, Lynn Gregorash, Karen Scott, Linda Verbecken, Steve Vitale, Ursula Volk, Rick Vozar

**STAFF PRESENT:** Ruby Jefferson-Moore, Legal Counsel; PJ Monson; Roxanne Peterson; Mark Herman (portion of meeting)

**CALL TO ORDER**

The meeting was called to order at 10:05 a.m. by Karen Scott, Chair. A quorum of 8 members was present.

**WELCOME AND INTRODUCTIONS**

Roxanne Peterson welcomed the Committee members and thanked them for their willingness to participate on the Committee. Each member introduced themselves, giving a brief background.

**ADOPTION OF AGENDA**

**MOTION:** James Coutts moved, seconded by Rick Vozar, to approve the agenda as published. Motion carried unanimously.

**COMMITTEE ROSTER**

The Committee received a copy of the Roster and made revisions where necessary.

**DISCUSSION OF COMMITTEE'S CHARGE, ROLE AND RESPONSIBILITY**

Ruby Jefferson-Moore reported that the purpose of the Committee is to review real estate appraisal reports for compliance with USPAP and provide a recommendation to the Department to approve or deny the application based on whether it meets all appropriate USPAP requirements.

Ms. Jefferson-Moore advised that the appraisal reports that the Committee members reviewed and the information they discussed at the meetings relating to the appraisal reports are confidential.

Committee members asked about their liability while on the Committee. Ruby Jefferson-Moore advised that there is a provision in the Statute that Committee members will have liability protection, assuming that the Committee member is acting within the scope of the appointment.

The Committee members asked what the procedure should be if they get an appraisal report for someone they know or who is a competitor. Ms. Jefferson-Moore advised that if a Committee member can be unbiased in making a decision, the member can participate in the review. However, the Committee member should be aware that his or her participation in the review may leave open the question and perception of potential conflict of interest with an individual appraiser. The Committee member must weigh his or her decision of whether to participate carefully.

### **DISCUSSION AND APPROVAL OF APPROPRIATE APPRAISAL STANDARDS TO BE USED IN THE REVIEW PROCESS**

The Committee discussed the review process, the USPAP standards, use of a report form, and other general questions or concerns the Committee members had relating to the review of the appraisal reports.

#### **Review Report Form**

The Committee received three appraisal report forms for possible use by the Committee to document the results of their reviews.

**MOTION:** Marla Britton moved, seconded by Linda Verbecken, that, for consistency, the Committee use the report form that Karen Scott has been using for previous reviews. Motion carried unanimously.

Karen Scott will send a copy of her review form to PJ Monson, who will reformat the form and send it to Committee members.

#### **Review Process**

- Members will be assigned appraisal reports to review based on the Committee member's field of primary expertise, credential held, and geographic location.
- Committee members will review the appraisal reports to determine whether the reports meet the appropriate USPAP standards.
- During the review, if there are deficiencies in the appraisal reports, the Committee members should contact PJ Monson and she will write a letter to the applicant asking for the information needed in hopes that the information will be received prior to the Committee meeting so a final recommendation can be made to the Committee.
- The Committee members must complete a written review report for each appraisal report using the form that the Committee agreed upon.
- The Committee will discuss the reviews at the Committee meeting and give its recommendations to the Department as appropriate.

#### **General Discussion Items:**

- Committee members should let PJ Monson know their areas of expertise and what areas they are not comfortable with.

- Stick to the USPAP standards. No personal comments should be included in the review reports.
- Appraisal reports must meet USPAP standards.
- Appraisal reports must have signatures.
- Reviewers have the option to request the appraiser's work file.
- Reviewers should request supplemental standards, when necessary.
- Applications that identify "jurisdictional exception" will be addressed on a case-by-case basis.
- Committee members should not discuss the file with other Committee members during their reviews.
- Committee members should request reassignment if they are not comfortable about reviewing the appraisal reports they have been assigned.
- Committee members should not discuss the file with the applicant. The applicant should be referred to PJ Monson who will provide assistance to the applicant.

### **CLOSED SESSION**

**MOTION:** Linda Verbecken moved, seconded by Marla Britton, to convene to Closed Session to consider licensure or certification of individuals pursuant to s. 19.85(1)(b), Stats., and to consider individual histories pursuant to s. 19.85(1)(f), Stats. Roll Call Vote: Marla Britton-yes; James Coutts-yes; Lynn Gregorash-yes; Linda Verbecken-yes; Steve Vitale-yes; Ursula Volk-yes; Rick Vozar-yes; Karen Scott-yes. Motion carried unanimously.

Open Session recessed at 12:20 p.m.

The Committee reviewed and considered the appraisal experience and appraisal reports of applicants applying for licensure.

### **RECONVENE TO OPEN SESSION**

**MOTION:** Lynn Gregorash moved, seconded by James Coutts, to reconvene into Open Session at 1:55 p.m. Motion carried unanimously.

### **VOTE ON ITEMS CONSIDERED OR DELIBERATED UPON IN CLOSED SESSION, IF VOTING IS APPROPRIATE**

**MOTION:** Linda Verbecken moved, seconded by James Coutts, to recommend that the Department approve **Joseph Michalowitz's** appraisal work subject to receiving a new appraisal report which complies with all of the USPAP requirements. Motion carried unanimously.

**MOTION:** Marla Britton moved, seconded by James Coutts, to table review of **Dominic Michelson's** appraisal reports until the December 15, 2004, Committee meeting. Motion carried unanimously.

- MOTION:** Linda Verbecken moved, seconded by Rick Vozar, to recommend that the Department approve **James Barrette's** appraisal work subject to receiving a new appraisal report which complies with all of the USPAP requirements. Motion carried unanimously.
- MOTION:** Linda Verbecken moved, seconded by James Coutts, to recommend that the Department approve **Shelly Hill's** appraisal reports subject to receipt of an explanation concerning some questions the reviewer had. Motion carried unanimously.
- MOTION:** Steve Vitale moved, seconded by James Coutts, to recommend that the Department accept **Paul Boyajian's** appraisal reports subject to receipt of one additional appraisal report to be reviewed by the reviewer. Motion carried unanimously.
- MOTION:** Steve Vitale moved, seconded by Lynn Gregorash, to recommend that the Department approve **Gordon Misner's** appraisal reports subject to receiving an additional analysis of sales history. Motion carried unanimously. Marla Britton was not present during closed session discussion and abstained from voting.
- MOTION:** James Coutts moved, seconded by Lynn Gregorash, to recommend that the Department request true, signed copies of the appraisal reports from **Daniel Pergolski**; and, that upon receipt of the true, signed appraisal reports approve his appraisal work. Motion carried unanimously.
- MOTION:** Lynn Gregorash moved, seconded by Ursula Volk, to recommend that the Department accept **Tom Bonneville's** appraisal reports as submitted. Motion carried unanimously.
- MOTION:** Marla Britton moved, seconded by James Coutts, to recommend that the Department accept **Felipe Maldonado's** appraisal reports subject to a correction on one appraisal report and subject to receiving one more appraisal report that addresses USPAP deficiencies such as scope of work, etc. Motion carried unanimously.
- MOTION:** Marla Britton moved, seconded by Steve Vitale, to recommend that the Department approve **Matthew Broback's** appraisal reports subject to receiving one more appraisal report that meets USPAP deficiencies that the Committee identified. Motion carried unanimously.
- MOTION:** James Coutts moved, seconded by Steve Vitale, to recommend that the Department approve **Lonnie Mrozinski's** appraisal reports subject to receiving one more appraisal report that addresses USPSP deficiencies such as intended user and scope of work. Motion carried unanimously.

**MOTION:** Lynn Gergorash moved, seconded by Rick Vozar, to recommend that the Department approve **Patrick Haley's** appraisal reports as submitted. Motion carried unanimously.

**MOTION:** Marla Britton moved, seconded by Steve Vitale, to table review of **William Morris'** appraisal reports until the December 15, 2004, Committee meeting. Motion carried unanimously.

**MOTION:** Rick Vozar moved, seconded by Ursula Volk, to recommend that the Department request that **Eric Butcher** submit the true, signed copy of one of the appraisal reports; submit a completely new appraisal report to replace one of the appraisal reports that was submitted; and, to provide an explanation of differentially fair-market rents for the third property. Motion carried unanimously.

**MOTION:** Marla Britton moved, seconded by James Coutts, to table review of **Shirley Carey's** appraisal reports until the December 15, 2004, Committee meeting. Motion carried unanimously.

#### **FUTURE MEETING DATES**

**MOTION:** James Coutts moved, seconded by Steve Vitale, to schedule the next two meetings for December 15, 2004, and January 26, 2005, beginning at 10:00 a.m. Motion carried unanimously.

#### **ADJOURNMENT**

**MOTION:** Lynn Gregorash moved, seconded by Rick Vozar, to adjourn the meeting. Motion carried unanimously.

Meeting adjourned at 2:30 p.m.